

For Sale

Location: **Sydney**
Asking: **\$2,850,000**
Type: **Services-Other**

Rare Opportunity to Purchase Highly Profitable Independent Mortgage Brokerage

An independent mortgage brokerage firm established in July 2014, has garnered a reputation for excellence in the Australian mortgage industry. Founded by a visionary duo, our client's core ethos is to provide clients with a premium brand experience with exceptional client service and expert knowledge. This profitable firm provides a broad spectrum of lending options, including owner-occupied and investment loans, collaborating with over 40 lenders like major banks and credit unions. Serving over 2,916 clients, it has built strong community ties and a reputation for quality service and high client satisfaction.

Robust Growth Trajectory: With a history of impressive growth, the firm boasts a vast client base exceeding 2,900 satisfied customers nationwide, facilitated by a retention rate nearing perfection. The firm's in-house retentions team and proactive client management have enabled it to rewrite loans, reduce runoff, and grow its portfolio by leveraging existing relationships for tailored financing solutions. This strategy led to substantial FY24 results, with loan settlements reaching \$31.2 million in Q1 and \$41 million in Q2, demonstrating the success of its retention and expansion efforts.

Expert Team and Operational Excellence: Led by experts with over 50 years of combined experience, the business excels in operational efficiency, client retention innovation, and offering high-quality, customised financial solutions.

Strategic Market Positioning: Operating from a prime location, this business offers a turnkey operation with state-of-the-art marketing strategies, a well-established brand reputation, and a solid financial standing to withstand market fluctuations.

Future Growth Potential: The firm is well-positioned for expansion, with a pipeline of innovative marketing campaigns and a commitment from the current owners to support a smooth transition, offering consulting services during the handover period.

Supportive Transition: The current owners are ready to provide consulting support during the handover, ensuring a smooth transition for the new owners.

Location Details: Operating nationwide, this business provides the flexibility to lease or purchase prime office space with modern amenities, enhancing its long-term stability and prospects.

Contact:

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